



Filing ID #10020575

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Lauren Elizabeth Baer
Status: Congressional Candidate
State/District: FL18

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ally Bank Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Citibank Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Citibank IRA ⇒ AB GLOBAL BOND FUND ADVISOR CLASS (ANAYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ BARON EMERGING MARKETS FUND INSTITUTIONAL CLASS (BEXIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ BROWN ADVISORY SMALL-CAP FUNDAMENTAL VALUE FUND INVESTOR CLASS (BIAUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ CLEARBRIDGE LARGE CAP GROWTH FUND CLASS IS (LSITX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Citibank IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COLUMBIA SELECT LARGE-CAP VALUE FUND ADVISOR CLASS (CSERX) [MF]					
Citibank IRA ⇒ DOUBLELINE EMERGING MARKETS FIXED INCOME FUND CLASS I (DBLEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ DREYFUS/ STANDISH GLOBAL FIXED INCOME FUND CLASS I (SDGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ EATON VANCE FLOATING RATE FUND (INSTITUTIONAL SHARES) (EIBLX) [MF] COMMENTS: Sold 2/1/18.	SP	None	Tax-Deferred		
Citibank IRA ⇒ GOLDMAN SACHS EMERGING MARKETS EQUITY INSIGHTS FD CLASS I (GERIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL CLASS (GIBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ INVESCO DIVERSIFIED DIVIDEND FUND CLASS Y (LCEYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ ISHARES TR MSCI USA MINIMUM VOLATILITY ETF (USMV) [EF] COMMENTS: Sold 2/1/18.	SP	None	Tax-Deferred		
Citibank IRA ⇒ ISHARES TR RUSSELL 1000 VALUE ETF (IWD) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ MFS INTERNATIONAL EQUITY FUND CLASS I (MIEIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ T ROWE PRICE BLUE CHIP GROWTH (TRBCX) [MF] COMMENTS: Sold 2/1/18.	SP	None	Tax-Deferred		
Citibank IRA ⇒ THE HARTFORD INTERNATIONAL VALUE FUND	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CLASS I (HILIX) [MF]					
Citibank IRA ⇒ WESTERN ASSET CORE PLUS BOND FUND CLASS I (WACPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Citibank IRA ⇒ WESTERN ASSET INSTL GOVT MONEY MARKET (WAGI) [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Gretna Realty Associates, LLC ⇒ Westside Center South [RP]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
LOCATION: Gretna, LA, US DESCRIPTION: 00.49% ownership interest in commercial property in Gretna, LA.					
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Cherry Tree Investors, LLC ⇒ Cherry Tree Plaza [RP]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Washington, IL, US DESCRIPTION: 2.96% ownership interest in commercial property in Washington, IL.					
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Highland Square Investors, LLC ⇒ Highland Square Shopping Center [RP]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
LOCATION: Jacksonville, FL, US DESCRIPTION: 00.64% ownership interest in commercial property in Jacksonville, FL.					
Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Satilla Square Investors, LLC ⇒ Satilla Square [RP]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Waycross, GA, US DESCRIPTION: 1.34% ownership interest in commercial property in Waycross, GA.					
Marjorie B. Baer Irrevocable Grandchildren's Trust ⇒ John Hancock Universal Life Insurance Policy [WU]		\$500,001 - \$1,000,000	None		
Meyers-Baer 2016 Long Term Trust ⇒ Cherry Tree Investors, LLC ⇒ Cherry Tree Plaza [RP]	DC	\$1,001 - \$15,000	Dividends	None	None
LOCATION: Washington, IL, US DESCRIPTION: 00.85% ownership interest in commercial property in Washington, IL.					
Meyers-Baer 2016 Long Term Trust ⇒ Highland Square Investors, LLC ⇒ Highland Square Shopping Center [RP]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Jacksonville, FL, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 00.51% ownership interest in commercial property in Jacksonville, FL.					
Morgan Stanley Brokerage Account ⇒ BANK HAPOALIM CD NEW YORK CITYNY CD [BA]		None	Interest	\$201 - \$1,000	None
COMMENTS: CD matured and redeemed on 4/3/18.					
Morgan Stanley Brokerage Account ⇒ DISCOVER BK GREEN GREENWOOD DECD [BA]		\$50,001 - \$100,000	None		
Morgan Stanley Brokerage Account ⇒ Morgan Stanley Bank Deposit Program [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash deposits.					
Morgan Stanley Brokerage Account ⇒ MORRILL & JAMES MERRIAM KS CD [BA]		None	Interest	\$1 - \$200	None
COMMENTS: CD matured and redeemed on 1/16/18.					
Morgan Stanley Brokerage Account ⇒ MSILF PRIME PTF INST (MPFXX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	None
Morgan Stanley Brokerage Account ⇒ washington fed SEATTLE WA CD [BA]		None	Interest	\$1 - \$200	\$201 - \$1,000
COMMENTS: CD matured and redeemed on 2/12/18.					
Morgan Stanley Brokerage Account ⇒ Whitney Bank Gulfport MS CD [BA]		None	Interest	None	\$201 - \$1,000
COMMENTS: CD matured and redeemed on 11/14/17.					
Morgan Stanley IRA ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/22/18.					
Morgan Stanley IRA ⇒ COLUMBIA SELECT LG CP VAL I (CSVZX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ EDGEWOOD GROWTH INSTL (EGFIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ FEDERATED INTL LEADERS IS (FGFLX) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/8/18.					
Morgan Stanley IRA ⇒ FEDERATED KAUFMAN LG CP INSTL (KLCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ THORNBURG INTL GROWTH I (TINGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA ⇒ THORNBURG INTL VALUE I (TGVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Managed Investment Account ⇒ AB SMALL CAP GRW ADV (QUAYX) [MF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ AMER CENT EMERG MKTS I (AMKIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Morgan Stanley Managed Investment Account ⇒ AQR MNGD FUTURES STRAT I (AQMIX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ARTISAN INTERNATIONAL ADV (APDIX) [MF] COMMENTS: Sold 3/9/18.		None	Dividends	None	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ BLACKROCK HI YIELD BD PTF INST (BHYIX) [MF] COMMENTS: Sold 1/12/18.		None	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX) [MF] COMMENTS: Sold 3/22/18.		None	Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CENTER COAST MLP FOCUS I (CCCNX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ CLEARBRIDGE LARGE CAP GWTH I (SBLYX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ COLUMBIA SELECT LG CP VAL I (CSVZX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ GOLDMAN SACHS ABSLT RET TRCK I (GJRTX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒		None	Capital Gains	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Goldman Sachs GRW OPPORT I (GGOIX) [MF]					\$1,000
COMMENTS: Sold 3/23/18.					
Morgan Stanley Managed Investment Account ⇒ HARTFORD MIDCAP I (HFMIX) [MF]		\$1,001 - \$15,000	None		
Morgan Stanley Managed Investment Account ⇒ HENNESSY JAPAN INST (HJPIX) [MF]		\$1,001 - \$15,000	None		
Morgan Stanley Managed Investment Account ⇒ ISHARES CORE US AGGREGATE (AGG) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ISHARES RUSSELL MIDCAP G ETF (IWP) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ ISHARES TIPS BOND ETF (TIP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX) [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ JOHN HANCOCK INTL GROWTH I (GOGIX) [MF]		\$15,001 - \$50,000	None		
Morgan Stanley Managed Investment Account ⇒ JPMORGAN US LG CP CORE PLS I (JLPSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Morgan Stanley Managed Investment Account ⇒ LAZARD EMERGING MKTS EQ I (LZEMX) [MF]		None	Dividends	None	\$1 - \$200
COMMENTS: Sold 3/8/18.					
Morgan Stanley Managed Investment Account ⇒ PIMCO ENHANCED SHRT MTRT EXC (MINT) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ POLEN GROWTH INSTITUTIONAL (POLIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ POWERSHARES RUSSELL MIDCAP P (PXMV) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ PRINCIPAL SM MDCP DIV INC I (PMDIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Managed Investment Account ⇒ PRINCIPAL SM MDCP DIV INC P (PMDPX) [MF]		None	Dividends	None	\$1 - \$200
COMMENTS: PMDPX merged into PMDIX on 6/27/17. See entry above.					
Morgan Stanley Managed Investment Account ⇒ THORNBURG INTL VALUE I (TGVIX) [MF]		\$15,001 - \$50,000	None		
Morgan Stanley Managed Investment Account ⇒ VIRTUS NWFLT MLTSEC SHTM BD I (PIMSX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ VIRTUS VONTOBEL EMRG MKT OPP I (HIEMX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ WELLS FARGO SPECIAL MDCP VL I (WFMIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Morgan Stanley Managed Investment Account ⇒ XTRACKERS MSCI JAPAN HEDGED EQ (DBJP) [MF]		None	Dividends	None	\$1 - \$200
COMMENTS: Sold 3/1/18.					
Morgan Stanley Roth IRA ⇒ AB SMALL CAP GRW ADV (QUAYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ ALERIAN MLP ETF (AMLPE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AMER CENT EMERG MKTS I (AMKIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AMG TIMESSQ MID CAP GW Z (TMDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ AQR MNGD FUTURES STRAT I (AQMIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ CAUSEWAY INTL VALUE INSTL (CIVIX) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/22/18.					
Morgan Stanley Roth IRA ⇒ COLUMBIA SELECT LG CP VAL I (CSVZX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
EDGEWOOD GROWTH INSTL (EGFIX) [MF]					
Morgan Stanley Roth IRA ⇒ FEDERATED INTL LEADERS IS (FGFLX) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/8/18.					
Morgan Stanley Roth IRA ⇒ FEDERATED KAUFMAN LG CP INSTL (KLCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ GOLDMAN SACHS ABSLT RET TRCK I (GJRTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ GOLDMAN SACHS GRW OPPORT I (GGOIX) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/23/18.					
Morgan Stanley Roth IRA ⇒ HARDING LOEVNER EMERG MKTS ADV (HLEMV) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ HENNESSY JAPAN INST (HJPIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ JOHN HANCOCK DISPLND VAL INST (JVLIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ JPMORGAN US LG CP CORE PLS I (JLPSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ MAINSTAY LARGE CAP GRW I (MLAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ POWERSHARES RUSSELL MIDCAP P (PXMV) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ THORNBURG INTL GROWTH I (TINGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ THORNBURG INTL VALUE I (TGVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ TOUCHSTONE MID CAP VALUE Y (TCVYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Roth IRA ⇒ VANGUARD SM CAP VALUE ETF (VBR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA ⇒ XTRACKERS MSCI JAPAN HEDGED EQ (DBJP) [MF]		None	Tax-Deferred		
COMMENTS: Sold 3/1/18.					
WeWork 401K ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
WeWork Stock Options [OP]	SP	Undetermined	Ordinary Income	None	\$15,001 - \$50,000
DESCRIPTION: Options to purchase stock in WeWork, a privately held company. These options are not part of an ESOP. The options have an expiration date of February 3, 2026.					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
WeWork	Spouse Salary	N/A	N/A
Albright Stonebridge Group	Consulting Fees	\$20,000.00	\$25,000.00
U.S. Department of State	Salary	N/A	\$22,525.84

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Access Group Incorporated	2004-2007	Law School Loans	\$15,001 - \$50,000
COMMENTS: Loan satisfied in full January 2017.				

SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President and Member of the Board	Association of Marshall Scholars
COMMENTS: Uncompensated position in Marshall Scholar alumni association. Vice President (2015-present); Member of the Board (2009-present).	

Position	Name of Organization
Treasurer	Columbia Road Condominium Association
COMMENTS: Uncompensated position in residential condo association (June 2013-May 2017).	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Citibank IRA (Owner: SP)
- Gretna Realty Associates, LLC
LOCATION: US
- Lauren Elizabeth Baer 2014 Long Term Trust
- Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Cherry Tree Investors, LLC
LOCATION: US
- Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Highland Square Investors, LLC
LOCATION: US
- Lauren Elizabeth Baer 2014 Long Term Trust ⇒ Satilla Square Investors, LLC
LOCATION: US
- Marjorie B. Baer Irrevocable Grandchildren's Trust
- Meyers-Baer 2016 Long Term Trust (Owner: DC)
- Meyers-Baer 2016 Long Term Trust ⇒ Cherry Tree Investors, LLC (Owner: DC)
LOCATION: US
- Meyers-Baer 2016 Long Term Trust ⇒ Highland Square Investors, LLC (Owner: DC)
LOCATION: US
- Morgan Stanley Brokerage Account
LOCATION: US
- Morgan Stanley IRA
- Morgan Stanley Managed Investment Account
LOCATION: US
- Morgan Stanley Roth IRA
- WeWork 401K (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Lauren Elizabeth Baer , 05/15/2018